

OpenBiblio Documentation

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1 Introduction

This manual provides documentation for users of OpenBiblio 1.0, an automated library system.

1.1 About This Documentation

This documentation uses ASCIIDoc, using a workflow borrowed from the Evergreen ILS Documentation Interest Group.

2 The OpenBiblio Community

We are happy to welcome to the OpenBiblio Community! You have joined a worldwide group of librarians, developers, community centers.

2.1 Getting help

You can get help from the mailing list or the sourceforge forums.

2.2 Reporting bugs

You can report bugs in the bitbucket repository.

2.3 Creating plugins

Instructions coming soon.

3 Installing OpenBiblio

3.1 System requirements

We have tested OpenBiblio installation on Windows 7 and Ubuntu Linux 14.04.

We also plan to test other versions of Windows, Ubuntu Linux 12.04, Debian Linux, Fedora Linux, Mac OSX, and CentOS Linux.

To install OpenBiblio, you will need PHP version 5.4 or higher. We have not yet tested OpenBiblio on PHP 6.x or 7.x.

You will need MySQL. Not sure of version.

You will also need Apache.

3.2 Installing OpenBiblio 1.0 on a Windows computer

You can turn your personal Windows computer into an OpenBiblio server. You will need administrator access to your computer, an Internet connection, and you may also need to check with your local IT experts that you are not behind a restrictive firewall.

Note that turning your personal computer into a server carries some risks, especially if your server is broadcasting across the web instead of just a local network. We recommend that you run this software on a dedicated computer that does not contain any sensitive or private data.

3.2.1 Install prerequisite software

1. Download EasyPHP's Webserver from <http://easyphp.org>. We have tested these instructions with version 14.1 of EasyPHP.
2. Agree to the relevant licenses and choose an installation folder that is convenient for you.
3. Once EasyPHP is installed, it will appear as an icon in your system tray. On Windows 7, click on this icon and open the dashboard.
4. The dashboard will open in your default Web browser. Once it does, click Settings in the top right corner of the screen.
5. Click on HTTP SERVER. Install and start this service.
6. Click on DB SERVER. Install and start this service.
7. Go back to the dashboard.
8. Under modules, you should now see an option to administer MySQL through a program called PhpMyAdmin.
9. Open PhpMyAdmin. The default username is root and there is no default password. Click on Users.
10. Click on "Edit Privileges" next to root.
11. Click on "Change Password".
12. Click on Add user.
13. Choose a memorable username, like obiblio, and enter it. In the host field, enter "localhost". Create a long, secure, memorable password.
14. Under "Database for user", there should be a checkbox for "Create database with same name and grant all privileges". Check this box.
15. Click go.

3.2.2 Install OpenBiblio

1. Open the EasyPHP dashboard.
 2. Go to Settings and open the HTTP SERVER settings.
 3. Note the Document Root field. This is the folder on your computer where OpenBiblio will be running.
 4. Open the DB SERVER settings. Note the parameters area.
 5. Download OpenBiblio and place the files into the Document Root folder.
 6. Open the document root folder.
 7. Locate the file database_constants_deploy.php. Make a copy of this file called database_constants.php.
 8. Edit your new database_constants.php file. Enter the database, username, and password you created in PhpMyAdmin. The hostname should be the IP address and port that you noticed in the DB SERVER settings in the format 192.168.333.333:3388, where 192.168.333.333 is the IP address and 3388 is port number.
 9. Save the file.
 10. Go back to the EasyPHP dashboard and open the HTTP SERVER settings once more.
 11. There is a link there to open up OpenBiblio under the URL field.
 12. Add /install to the end of the URL in your browser. The installer should run.
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3.2.3 Using the OpenBiblio installer.

1. Install test data if you would like.
2. Log in to your new OpenBiblio system. The default user is admin with password admin.

3.3 Installing OpenBiblio 1.0 on a shared Linux host

1. Create a database using your hosting service's interface. Note the host, username, password, and database name.

3.4 Installing OpenBiblio 1.0 on a Linux host with full access

This section details the installation process for several Linux distros.

Yaz?

4 OpenBiblio System Administration

Thanks for being an OpenBiblio system administrator. We're glad that you are helping your library in this way.

4.1 Configuring the staff interface

This section will describe settings found in the admin menu.

4.2 Configuring the OPAC

This section will describe settings found in the admin menu.

4.3 Managing Plugins

This section will describe plugins

4.4 Managing the MySQL database

This section will describe the database

4.5 Managing the server

This section will discuss other server-level considerations.

4.5.1 Logs

This section will mention logs of particular interest to OpenBiblio administrators.

5 Circulation

The circulation module is the heart of the OpenBiblio system.

5.1 Checking out materials

To check out materials, you must first open a member's account.

5.1.1 Retrieving a member's account.

1. Click on Circulation on the left side of the screen.
2. Enter a portion of the member's last name. If you have member barcodes turned on, you may alternatively scan their barcode.

Tip

Anybody with administrator privileges can turn member barcodes on using Tools → System Settings → Use Member Barcodes.

5.1.2 Chcecking out an item

1. Type or scan the item barcode into the Check Out field.

Something about due dates, etc.

5.2 Checking in materials

1. Click on Circulation on the left side of the screen.
2. Click Check In.
3. Type or scan the barcode number.
4. If the book was checked out, it will be added to the shelving cart, which is represented by a list at the bottom of the screen.

What if it is a weird status, does it change to regular?

How do you empty the shelving cart?

What if there is a hold or fines on the item?

5.3 Holds

You can place holds on items so you can check them out at a later time.

5.4 Bookings

You can also book certain items

6 Cataloging

OpenBiblio offers several ways to get your materials into your catalog.

6.1 Copy cataloging

1. Click Cataloging.
2. Click New Item.
3. Type or scan an ISBN. If you are unable to find any results using an ISBN, you can use the dropdown menus to try other search criteria.
4. If it finds a catalog record from a different library, it will fill in all the fields that it can, based on the media type and information from the other library.
5. Make sure that the call number is correct.
If you are seeing the wrong type of call number (e.g. you see a LoC call number when your library uses Dewey Decimal), somebody with admin privileges will need to change the Admin → Online Options settings.
6. Click Submit.
7. Enter copy information as needed. Click Update.

6.2 Original cataloging

Instructions coming soon

6.3 Importing MARC records

By default, the MARC record importer imports items as a "test load," so you can verify that there are no errors. You can set "test load" to false once you are satisfied with your settings and file.

6.4 Importing CSV records

Instructions coming soon.

6.5 Bulk delete records

This functionality does not yet exist.

7 Research

OpenBiblio can help with your research.

7.1 DOI search

A DOI (digital object identifier) can refer to an article, journal, digitized archival object, or any other digital object that may help you in your research. If you have one of these identifiers, you can paste it into the DOI search box, and OpenBiblio will open the relevant resource in a new tab for you.

8 Reports

OpenBiblio has a very flexible report system.

8.1 Running a report

Do it!

8.1.1 Exporting to different formats

It seems like PDF isn't working :-(

8.2 Adding new reports

You need access to the server via FTP, RDP, or SSH.

9 OpenBiblio Recipes

This is a collection of neat tricks and configurations that might be nice for your library.